

CAPT Meeting Minutes June 29, 2018

Present: Tom Teper, Tom Habing, John Laskowski, Lynn Wiley, MJ Han, Cherie' Weible, Bill Mischo

Absent: Michael Norman, Jim Dohle, Kyle Rimkus

Agenda and Minutes

Tom Teper opened the meeting requesting approval of the June agenda and May minutes. Agenda and minutes were unanimously approved.

VuFind 4.1

John Laskowski asked how many complaints were being received. Cherie' and Bill responded that they were receiving multiple complaints daily. They are sending users to the old version for now. About half of the problems have been fixed. Tom Teper asked if the issues were great enough to switch back to the old version completely, and all agreed that we could not realistically do that. Tom also asked if we should draft a letter with the top list of priorities to be fixed before fall semester. Cherie' suggested that we not draft a letter, but instead ask John Wilkin to call, which he offered to do. John Laskowski will make the classic search more obvious/visible on the website, then this subject will be brought to EC.

ILS Migration

Lynn stated that no information was forthcoming from CARLI. We are still waiting to hear from the board about which option they were going to choose. Tom Teper asked if a group should be formed to handle this, or if a coordinator should be hired. There was general consensus that a coordinator would be a positive step. The job description is currently being written. Tom asked if the group that Michael outlined in a message was sufficient. The group feels that this is a good place to start, and down the road add people based on expertise and knowledge.

Digitized Name/Photo Removal Requests

Tom Teper stated that Kyle sent a message out to the group regarding digital name/photo removal. Tom brought this subject to Cabinet. Tom conveyed his understanding from the Cabinet discussion, in which John Wilkin indicated that items that we are ordered to remove due to legal order, or are defamatory should be removed, but that the Library should not be in the business of editing the historical record. Cherie' pointed out that currently, the U.S. has no laws that force us to remove. John L. stated that the Library privacy policy needs to be updated and should include this subject. Cherie' agreed it would be nice to have a policy/procedure to point people to when requests come in. Tom Teper stated that a Collections policy about requests to remove materials from the collection has been in place since 2000. Bill asked if we have legal language to create a new policy/procedure. There was a suggestion made that we contact Sarah Benson to assist with writing the new policy/procedure.

Quarterly Working Group Reports

Cataloging and Metadata – MJ Han – Report attached.

Electronic Resources – Lynn Wiley - Report attached.

Meeting adjourned at 4:00 p.m.

Cataloging and Metadata Group
2018 2nd Quarter Report
June 29, 2018
Submitted by Myung-Ja K. Han

1. Policy on Local Notes

The Cataloging and Metadata Group has been working on the policy on local notes for the last two meetings. The group reviewed CARLI's document for local notes as well as the MARC21 standard and current practices in different units of the library for this work. All new policies on local notes will be available on the CAM webpage:

<http://guides.library.illinois.edu/cam/policies/mfhd/mfhdpolicies>

So far, the group has discussed:

- a. Copy-specific notes (including information about pieces that are a specified number of a limited edition; autographed copies; or slight variations in printings, such as an offprint of a larger work, or missing pages), which can be added in either Bib records or MFHD depending on the type of local note.
- b. Utilizing local notes for discovery in VuFind: Requested CARLI to index MARC21 Holdings fields 5xx so information added in those fields will be searchable and discoverable.

The group has been working on the serials local notes, which require consistent wordings to help users and Public Services staff. According to the Voyager report on serials public local notes, there are more than 55,000 unique values. The group has categorized those notes, and will come up with recommended notes for each category.

Once decided, the new policies will be shared with Public Service staff to gauge their opinions.

2. Priorities for Next Year

The group will meet on June 29th to discuss priorities for 2018-2019 as below.

- a. Plans for system migration
- b. Keeping up with national and international standards (for example PCC, LOD, etc.)
- c. Developing and implementing local policies

To: CAPT ERWG Report June 2018

Date: for mtg of June 28, 2018

From: Lynn Wiley, chair CAPT ERWG submitted June 2018

ERWG has met once since the last report on April 5th and will meet again in July

This has been a period of maintenance and few large issues to report on. SFX KB changes and version changes are handled with CARLI and have gone smoothly

Platform changes continue with providers and that has mostly impacted access with EZProxy. Staff need to work with vendors to configure resources for remote access. That work has consisted of set up and cross testing through to success with individual vendors. A committee of users in North America makes this easier as anyone subscribing to products with these changes has to learn how to make it work and all share that on the list serv. Typically smaller vendors simply do not know how to do this so the community of users will help to set up the vendor as needed.

I mention this too because of interest in Open Athens and EBSCO offers there and reminding us all about the many vendors and publishers this library works with...from the tiny with few staff to the very large.. We know that we cannot replace EZproxy access with Open Athens and Keith Wessel has discussed this with Wendy this week. If we do decide to try Open Athens we will still need to use EZ proxy and we will need to run both.

We have had to migrate some third party platform ebook platforms with ProQuest Ebook Central being the largest. Willy Kries was able to update all the MARC records that were previously being redirected to the current URL. He had to update each record when the redirects expired All went very well in that migration. He has done that with many more large sets of ebooks purchased from Gale or Proquest when their platforms change as well and thanks to his batch editing skills is able to accomplish this smoothly.

The VU Find changes saw some hiccups with ebook access for 24 hours but these were stable relatively quickly though there are still issues with that interface that are being addressed now. Stephanie also worked with CARLI to test switching the SFX VuFind catalog target to new VUFind and testing showed no problems so that is going into production thanks to Denise and Stephanie's work on scenario testing.

We have noticed that the Easy Search results could bring back MARC records that are not full text records. We were waiting for the new VUFind to retest this and will report back to Jay any problems as he thought the new interface would correct this results display to bring back only those records that did indeed have full text. We haven't had time to test that yet being busy with year-end close but will test a few things starting next week. We would like to invite Jay to sit in on the ERWG group next meeting to review those.

Security issues have been minimal with very few access interruptions with vendors reporting overuse. We are getting many requests from vendors to confirm the new GDPR privacy law changes that the EU members must adhere to. It is a tsunami of emails and if we must confirm we do.

We are working on new communication workflow for all serial changes, cancels and renewals have been clear but we will add on notifications of ceased titles as well as merged, split and takeovers to let CAM know re record updates. Thanks to the Cataloging and Metadata team, processes for consistently adding notes on those changes are being defined and documented for implementation by staff. Thanks team!

We have reviewed our eresource new order workflow as well as the renewal workflow to be sure we have a smooth process to handle all issues. Ideally, a resource is ordered, paid for, activated and MARC added in a series of steps whereby a few staff are following them all as they progress. However, vendor set up issues, license hold ups, fund issues or remote testing problems as well as lack of vendor communication of activation alerts or lack of invoices sent or MARC made available can hold up the process. We are documenting cycle problems for final crosscheck when we know the resource is fully available to all users at any location.

Currently staff are engaged in:

- Assessment work for the EBSCO renewal
- Confirming Retention of holdings for recent serial cancels
- Continue to sample targets to test for access to subscribed to resources
- Engaged in collecting ebook vendors lists against or SFX holdings
- Continuing to prepare for migration

LW 6-26-2018